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ABSTRACT

This guide for the governing boards of independent institutions discusses conducting a comprehensive fund-raising campaign. A comprehensive fund-raising campaign is broader and more strategic than past capital fund raising campaigns. Its financial goals include all potential gifts from annual fund donors, all gifts for the endowment, all gifts for capital purposes, and gifts for other restricted purposes as well. Comprehensive fund-raising campaigns require intensive planning with board leadership and a written campaign plan. Comprehensive campaigns, most of which last at least 5 to 7 years, cost money, and the board must assure that the campaign is adequately funded. The campaign budget should supplement, not replace, the operating budget of an already healthy fund-raising program. Campaign leaders will develop goals for individual trustee giving and cumulative board support, and all trustees must be prepared to participate. The board must ensure that the campaign is conducted with the highest ethical standards and with sound policies and procedures. (SLD)

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BOARD BASICS

FUND-RAISING TOPICS

COMPREHENSIVE FUND-RAISING CAMPAIGNS

A Basic Guide for Governing Boards of Independent Institutions

EDITED BY JAKE B. SCHRUM

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About the Editor

Jake B. Schrum currently serves as president of Southwestern University in Georgetown, Texas. During his 30 years in higher education, Schrum has served in a variety of administrative and teaching positions at Yale, Southern Methodist, Harvard, Emory, Southwestern and Wesleyan (Connecticut) universities, and Muhlenberg College. He received a Bachelor of Arts degree from Southwestern University, attended the Perkins School of Theology at Southern Methodist University, and completed his graduate studies at Yale Divinity School. From 1991 to 1999, Schrum served as president of Texas Wesleyan University. During his tenure, the university doubled its enrollment, quintupled its operating budget and endowment, and acquired a law school.

Widely recognized as an author and speaker in the field of educational advancement, Schrum is author of *D'Oench's Last Stand: The Role of the New Urban University* and editor of *Distance for All*. In 2000, AGB published *A Board's Guide to Comprehensive Campaigns*, also edited by Schrum.

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The *Board Basics* Series provides information about board roles and responsibilities in an effort to strengthen the effectiveness of trustees and governing boards. The series is intended to inform debate and discussion, not to represent or imply endorsement by the Association or its members. Additional copies are available by calling the AGB Publications Department at 800/356-6317.

This text was adapted from *A Board's Guide to Comprehensive Campaigns*, a book published by AGB in 2000.

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Comprehensive Fund-Raising Campaigns

A Basic Guide for Governing Boards of Independent Institutions

Over the past few decades, many colleges and universities have chosen to reorganize their fund-raising efforts around the concept of a comprehensive campaign. Simply put, a comprehensive fund-raising campaign includes all gifts to the institution—for any purpose—from all sources except government grants—for a particular period of time. A comprehensive fund-raising campaign is at once broader and more strategic than past capital fund-raising campaigns. Its financial goals include all potential gifts from annual fund donors, all gifts for the endowment, all gifts for capital purposes, and gifts for other restricted purposes as well.

The governing board, through leadership, example, advocacy, and oversight, is responsible for the institution's fund-raising success. The board approves the institution's fund-raising policies and formally approves all campaign plans and goals. Equally as important, the board ensures that campaign plans and goals align with the institution's mission.

Pre-Campaign Planning

Comprehensive fund-raising campaigns require intensive planning. Before even considering such a campaign, the institution's governing board and leaders should initiate a long-range planning process that will reaffirm the mission and purpose of the institution, define its future needs, and set goals and priorities for the next significant period of time—most often, five years.

A CAMPAIGN-READINESS ASSESSMENT WILL HELP THE BOARD UNDERSTAND WHETHER THE INSTITUTION IS READY TO UNDERTAKE THE FUND-RAISING EFFORT.

One of the outcomes of this planning process is a strategic plan for the institution. Undoubtedly, this plan will identify a long list of institutional needs and funding priorities—probably many more than can be addressed in a single fund-raising effort. However, this list—or an abbreviated version—will form the basis for the comprehensive fund-raising campaign.

Next, a campaign-readiness assessment will help the board understand whether the institution is ready to undertake the fund-raising effort. This is an internal (institutional) audit that reflects the opinions and perceptions of board leadership, college officials, and the staff responsible for fund-raising and finance. It helps the board determine whether the institution is in the right position to initiate a campaign, and whether the right people, processes, and systems are in place to ensure success. If the board and college officials agree that the findings of the institutional assessment are positive, they then move forward by commissioning a campaign feasibility study.

A feasibility study will determine the readiness and willingness of an institution's leaders (professional and philanthropic) to support a major fund-raising effort. The study will also serve to:

- clarify trustee support (Goals for individual trustee giving and cumulative board support are key elements in setting the campaign's goals.),
- engage study participants in the campaign planning process,
- persuade them that their financial support will be required to achieve campaign goals,
- help the board evaluate the availability of potential campaign leaders (volunteers and donors),
- determine realistic fund-raising goals,
- identify potential lead gifts (essential to establishing a realistic campaign timetable),
- develop a realistic list of funding needs,
- identify the most attractive (fundable) programs and,
- provide the basis for the case statement and other campaign materials.

A NOTE ABOUT CONSULTANTS. Many boards invite outside consultants to help with pre-campaign planning. Although staff can conduct an institutional assessment and campaign-feasibility study, an outside consultant can provide a more objective view. Each institution should make its own decision about whether or not to use campaign consultants early in the planning process, based on its specific needs and institutional culture.

SHAPING THE CAMPAIGN—BOARD LEADERSHIP

To be successful, comprehensive fund-raising campaigns need formal board approval, personal support from each individual trustee, and committed volunteer leaders. The university president, along with the chief advancement officer, the governing board's chair, and the board's executive committee form the campaign's "leadership team." Most often, the board's development committee serves as campaign committee during the pre-campaign planning phase. Committee members assist in developing a written campaign plan and act as catalysts for pre-campaign giving.

During the pre-campaign planning phase, the leadership team works to identify and recruit a volunteer to chair the campaign committee. He or she will be asked to assume a highly visible role during the campaign effort, and so, must be well versed about the institution's needs and must be willing to make a sacrificial gift to the effort. He or she must also understand the responsibilities of the campaign committee.

The campaign committee is charged by the board to:

- establish campaign policies,
- revise campaign goals and objectives as necessary,
- provide guidance to the writer of the campaign case statement,
- identify donor prospects, and
- help formulate and implement strategies for successful donor cultivation and solicitation.

During most comprehensive campaigns, trustees are enlisted to serve on the campaign committee or any one of a number of campaign subcommittees. The size of the institution and such factors as the maturity of the development program and the nature of the institution's mission will determine the number of committees and each committee's structure. Subcommittees may assume responsibility for leadership gifts (e.g., $500,000 plus), major gifts ($50,000- $500,000), corporate and foundation contributions, and alumni giving.

Every trustee should volunteer in some capacity for the duration of the campaign. In fact, it is far more likely that the campaign will succeed when all trustees are engaged in the planning process and share responsibility for establishing funding priorities and campaign goals. The real key to success in comprehensive fund-raising campaigns is to ensure that each constituency with a stake in the campaign takes ownership in the plans, goals, costs, solicitations, and accomplishments. This process starts with the board of trustees and involves each committee or subsidiary committee working on the campaign.

THE WRITTEN CAMPAIGN PLAN. An approved campaign plan represents an agreement among trustees, institutional leadership, volunteers, and the staff who will work on the fund-raising effort. Decision makers approve all elements of the plan, while understanding that some parts will be revised during the effort. The plan is a working document. The development committee, as the board's agent, and the campaign committee, use the plan to guide campaign activity and assess progress toward the campaign's goals. The key elements of a written campaign plan are described below.

- *Campaign goals*. Goals are assigned to specific purposes described in the written plan, such as capital improvements, institutional endowment, student scholarships and grants. This helps the board determine how realistic each dollar goal is in relation to its purpose.

DURING MOST COMPREHENSIVE CAMPAIGNS, TRUSTEES ARE ENLISTED TO SERVE ON THE CAMPAIGN COMMITTEE OR ANY ONE OF A NUMBER OF CAMPAIGN SUBCOMMITTEES.

- *Campaign timeline.* Presented most often as dashboard chart, the timeline illustrates when dollar goals will (or should) be achieved. The board can see, at a glance, if the campaign is moving forward as planned, and if needed, recommend adjustments.
- *Campaign organization flow chart.* A flow chart will describe how volunteer committees and professional staff work together to ensure a seamless structure for campaign activities. *(The model flow chart on pages 10-11 illustrates a typical campaign organization structure for mid-sized independent institutions.)*
- ***Levels of giving/number of gifts needed to achieve the campaign goals.*** Another way to ensure that the campaign's financial goals are realistic is to illustrate how many gifts at each level are needed. *(See page 17 for the Model Campaign Giving table.)*

- *Campaign committee responsibilities.* Volunteer leaders should be provided with a brief description that clearly defines campaign committee structure and responsibilities. *(See page 18 for the Model Campaign Committee Description)*
- *Job descriptions for key campaign volunteers.* Before committing time, effort, and personal resources, the institution's volunteer leaders should be provided with job descriptions that outline the institution's expectations for the campaign. *(See page 19 for a Model Job Description for the Campaign Committee Chair.)*
- *Gift acceptance policies and procedures.* Gift acceptance policies provide guidance to prospective donors, advisers who assist donors in the gift-planning process, and staff who accept the gifts. Good policies allow some flexibility on a case-by-case basis so that the prospective donors may enjoy the greatest possible freedom in formulating their gifts. Donors should not be solicited until the board approves gift acceptance policies.

- *Campaign reporting standards.* This important policy addresses how institutions should determine the value of gifts for counting toward campaign goals and for tax purposes. It stipulates how the institution will recognize and credit outright and deferred gifts and pledges. In 1994, the Council for Advancement and Support of Education (CASE) established guidelines for managing campaigns and standards for reporting campaign gifts. These provide an objective means to compare one campaign against another, and a rational way to discern how well a campaign has met the institution's goals.

CAMPAIGN CASE STATEMENT. "The case statement is the central, definitive document that presents the purpose, scope, and justification of the fund-raising effort," wrote John W. Pocock in *Fund-Raising Leadership, A Guide for College and University Boards* (AGB, 1989). In other words, the case statement must make a compelling argument for financial support of the college's aspirations and its most pressing needs. "Beyond presenting a compelling case to prospective donors, the case statement should clarify issues and strategy for the people who will execute the fund-raising effort. The statement sharpens internal understanding. It forces clear organizational structure. It is the basic training document for all participants, professional or volunteer."

In its finished form, the campaign case statement should anticipate and answer these questions of the prospective donor:

- What is the overarching purpose of the campaign?
- What are the goals, and how are they justified?
- Why does the institution deserve my support? Why now?
- How can I make a gift, and how will my gift be used?
- What assurance do I have that my participation is really important to the success of the undertaking?

The board approves the campaign case statement, but the institution's chief advancement officer is responsible for its development. It should be written with input and guidance from trustees, academic leaders, campaign volunteers, and alumni. In addition, the university's president plays a key role in shaping the final document. He or she has the best understanding of the institution's needs and the audience it is intended to reach. Once approved by the board, the case statement becomes the public document that describes the institution's unique needs and makes

a strong case for support of the campaign. (*Note: An early draft of the case statement can be a helpful tool during the feasibility study, and, conversely, the feasibility study can help shape the final document.*)

Here are some questions for the board to consider before the campaign case statement is developed:

- Is the institution's mission statement current? Is it concise?
- How have prior fund-raising campaigns enhanced the institution?
- What are the campaign's specific goals? Are they critical to the institution's future?
- Has the board approved a campaign timetable?
- Who will write the case?
- Who will review the draft(s)?
- Who will approve the final version?
- How will campaign success be measured?

FUNDING THE CAMPAIGN. Comprehensive campaigns, most of which now last at least five to seven years, cost money. The board must assure that the campaign is adequately funded to accomplish its goals. The campaign budget should supplement (not replace) the operating budget of an already-healthy and aggressive fund-raising program. Although there is no definitive answer as to how much a comprehensive campaign should cost, the board should be prepared to cover those expenses in addition to the institution's regular fund-raising costs. However, if the institution's fund-raising program is new and untested, and if staff members are fairly new at their work, a more generous campaign budget will be necessary to ensure a successful effort.

The board should only approve a comprehensive campaign budget that funds reasonable costs over the campaign time frame. And, it will be important for the board to be able to distinguish which costs are additional owing to the campaign effort, as it may be possible to discontinue some of these activities and their associated costs as the campaign approaches its successful conclusion. The board will also want to know which costs are associated with campaign activities that serve to move the institution's advancement program to the next level of activity and success (i.e. post-campaign ongoing expenses are met to support increased fund-raising, gift management, stewardship of donors, and planning for future fund-raising efforts). The major components of a comprehensive campaign budget include:

- staff,
- capital expenses,
- publications,
- travel and expense accounts,
- campaign activities and special events,
- campaign consultants.

The campaign budget can be funded in a variety of ways, such as through annual income from endowment investments, unrestricted gifts, gifts restricted to support the campaign budget, or through a small levy attached to each campaign gift. If the board chooses the last option, donors must be informed before they are asked to make a gift to the campaign.

There are several important questions the board should ask about the campaign budget:

- What kind of long-term impact will the campaign have on the institution's budget?
- Is there sufficient flexibility in the fund-raising budget to accomplish the campaign's goals?
- How often will the board receive budget reports, and what type of information will the reports include?

PURSUING CAMPAIGN GOALS. It's easy to think only in terms of dollar goals when contemplating campaign success. A comprehensive campaign can accomplish much more than just raising money. A well-planned, well-run campaign can enhance an institution's reputation in the eyes of its donors, alumni, students, potential students, and the general public. More than likely, it will have a positive impact on academic programs, faculty and student affairs, campus facilities, and student-financial aid—and it will serve to increase the institution's donor base for future fund-raising. All of this can happen because involved and active trustees raise the awareness of potential donors during the campaign, and serve as a signal that the organization is well governed and merits their financial support. A successful comprehensive campaign ultimately results in a more highly engaged board and an ever-increasing pool of friends and supporters for the institution.

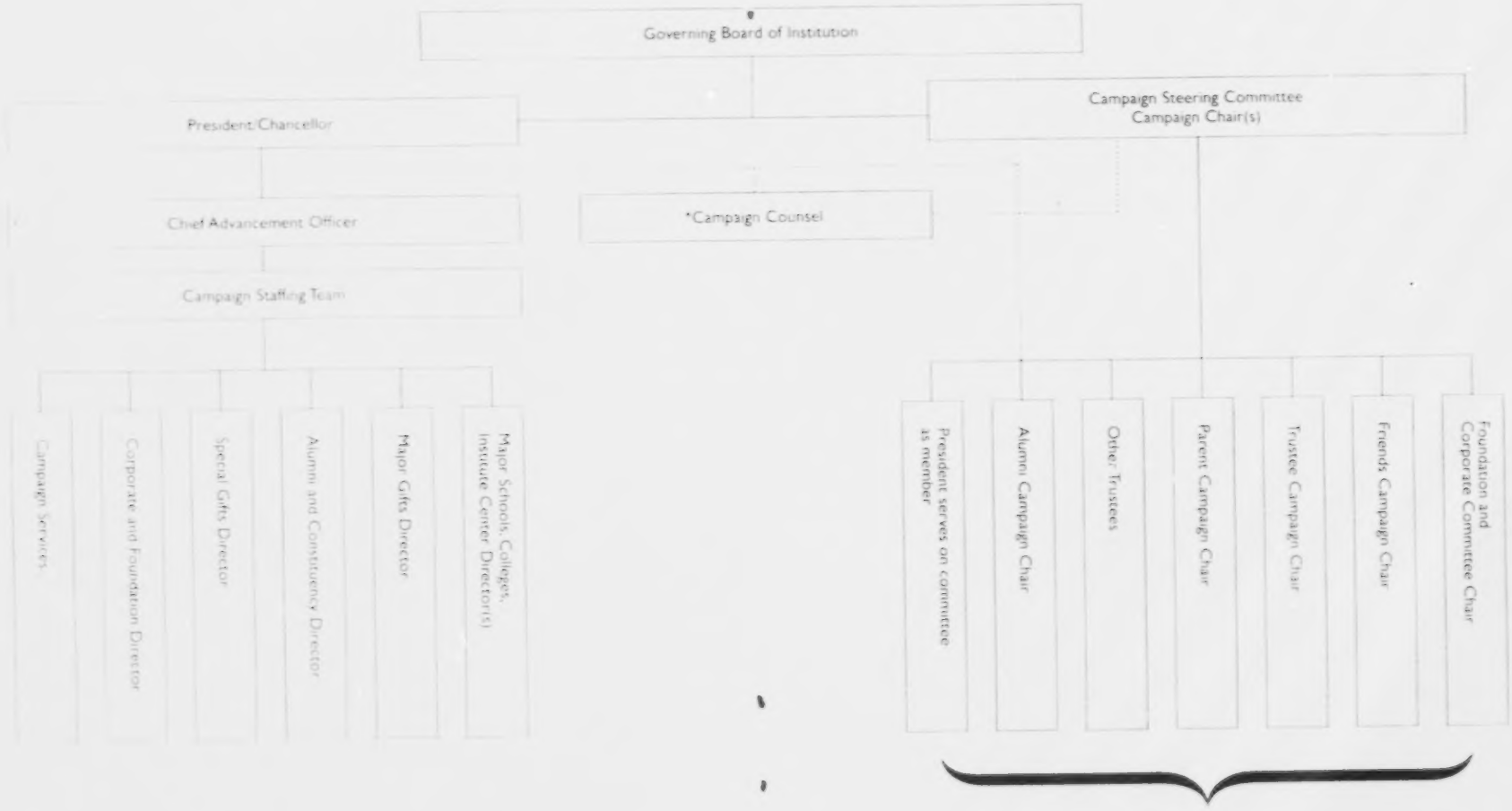
A WELL-PLANNED, WELL-RUN CAMPAIGN CAN ENHANCE AN INSTITUTION'S REPUTATION IN THE EYES OF ITS DONORS, ALUMNI, STUDENTS, POTENTIAL STUDENTS, AND THE GENERAL PUBLIC.

LEADERSHIP GIVING. A comprehensive fund-raising campaign also thrusts new expectations into trustee philanthropy. Campaign gifts from board leaders (the chair and executive committee) serve to introduce the comprehensive campaign to other trustees. When trustees make their contributions early in the campaign (ideally in the pre-campaign planning phase), they help raise confidence and make it easier to ask others to contribute. "How many trustees have contributed to the effort?" and "How much is the cumulative amount of their gifts?" are the most common questions asked by potential campaign donors, especially by foundations. Lead gifts (early gift pledges and outright contributions) by trustees and other volunteer leaders are essential to campaign success. They can be referred to with potential donors and announced during the campaign's public kickoff.

TRUSTEES AS FUND-RAISERS

When a college or university governing board approves a comprehensive campaign, its members are committing their own time and resources to meet the campaign's goals. Campaign leaders will develop goals for individual trustee giving and cumulative board support—all trustees should be prepared to participate. But trustees also play another important role. In addition to making a contribution early in the campaign, they are called on to identify prospective donors, recruit volunteers, and help cultivate potential donors. Individual and collective dedication and enthusiasm on the part of the board are the two most important factors in the success of the campaign.

Comprehensive Campaign Structure for Independent Institutions



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Sessions where trustees "rate" donor prospects are key to campaign success. Typically, trustees will assess a list of prospects in the following ways: the gift amount a prospective donor might be expected to give and the gift level he or she may be encouraged to consider; the readiness of the prospective donor to make a gift (i.e. now, after minimal cultivation or in the future, after more intense cultivation); the strength of the relationship between the rater and the prospect; giving history to the institution and to other organizations; and suggestions about who might be the most appropriate person to request the gift. In this exercise, the challenge to campaign leaders is to identify likely prospective donors and to help design a strategy to cultivate each one, to understand each donor's interests, and to begin a process that will encourage each prospect to respond to the campaign effort with an *extraordinary* gift. An *extraordinary* campaign gift is one that challenges more than a donor's regular cash flow. It challenges his or her financial assets. This kind of giving is important to both the donor and the institution. It indicates the donor's commitment to the campaign and to the college or university.

THE BOARD MUST ENSURE THAT THE CAMPAIGN IS CONDUCTED WITH THE HIGHEST ETHICAL STANDARDS AND WITH SOUND POLICIES AND PROCEDURES.

ENSURING CAMPAIGN INTEGRITY AND ACCOUNTABILITY. As the institution pursues its campaign goals, nothing is more important than the integrity and reputation of its leadership and programs. Before, during, and after a comprehensive campaign, the governance of the institution must be beyond reproach, and the chief executive officer, the board, professional staff, and campaign volunteers must exhibit model behavior. The board must hold the chief executive and staff accountable for attaining fund-raising goals and meeting deadlines. Equally as important, the board must ensure that the campaign is conducted with the highest ethical standards and with sound policies and procedures.

GIFT POLICIES AND PROCEDURES. As mentioned in the written campaign plan, comprehensive fund-raising campaigns need sound, clear, and useful written policies regarding the kinds of gifts and the levels of giving to be sought during the campaign. The campaign committee and development committee are responsible for recommending policies for how gifts will be counted and procedures for how donors will be recognized. Here are some issues for boards to consider regarding such policies and procedures:

- Between what specific dates will gifts be counted toward the campaign total?
- Does the institution have a written policy for named gifts? (Named gifts are those that memorialize donors.)
- Are there any "unacceptable" gifts?
- How will gifts of real property be valued and credited?
- Are there purposes for which gifts will not be counted?
- Will the following gift vehicles be counted:
  - — corporate matching gifts?
  - — life insurance?
  - — bequests?
  - — revocable giving instruments?
  - — irrevocable giving instruments?
- How will each of the above be valued?

RESPONSIBILITY TO DONORS. Donors want to know how their gifts will be used and how they will make a difference. Some may even want their gifts to be anonymous. As the institution works to meet its campaign goals, proper stewardship of donors and their gifts is essential. The current trend in philanthropy is for donors to want to be more involved with how their gifts will be used. It bears repeating that written policies should be in place at the outset of the campaign effort, and volunteer and staff solicitors should discuss these matters with donors as they work together to make a prospective gift a reality. Campaign pledges are important to the campaign's progress, but it is unwise to include a pledge toward the goals unless the institution possesses a signed pledge form or letter that clearly states the intentions of the donor.

As the institution prepares for the campaign, the board will need to consider how the institution should react when a donor's priorities for a gift do not meet the institution's needs as set forth in the campaign's goals. It might be inappropriate to count gifts that do not meet a designated need or deviate from the objectives of the campaign plan.

Moving the Campaign Forward

With campaign plan and case statement in hand, with volunteers and staff informed and trained, financing confirmed, campaign brochures and pledge cards printed, and a completed feasibility study that points toward success, the board is now ready for the most active phase of the campaign.

During this time (which may take longer than anticipated), campaign leaders will raise the first flurry of gifts to confirm the feasibility of reaching the financial goals within the time frame the written plan specifies. For example, if the campaign goal is to raise $50 million in seven years, and $25 million or more has been raised by the middle of the second year of the campaign, then it might be realistic to make a public announcement of the campaign and its goals. With more than one-third of the total in hand and less than one-third of the seven-year timetable elapsed, the chances for success are strong—unless, of course, all potential major donors have been solicited and the likelihood of additional large gifts is minimal.

Fine-tuning the campaign effort. The first year or two of the campaign effort provide the board and other campaign leaders an opportunity to see how the campaign plan is working. Is the budget adequate? Are the volunteers well trained and helpful? Are the staff members doing a good job? Is the chief executive leading the effort? Are potential donors responsive? Are there good data driving the campaign's information network? Are major gifts arriving as expected? If the answers to all these questions are affirmative, then the governing board should formally announce the campaign and its goals to the public.

A high-profile campaign announcement event provides an opportunity to celebrate gifts received, recognize campaign leaders, thank lead donors, expand the campaign's volunteer base, and help cultivate (inform and engage) new prospective donors. It also helps raise the institution's visibility, enhance its reputation, and highlight the campaign goals for the general public.

Many campaigns experience a plateau period about a year or two before the campaign goals are reached. Gifts and pledges may come in at a slower rate. Prospective donors may respond to gift solicitation more slowly—or with gifts smaller than anticipated. During this time, the board and campaign leadership should remain enthusiastic, energized, and focused on campaign success. This is an ideal time to reassess campaign results and adjust the campaign plan accordingly.

THE FIRST YEAR OR TWO OF THE CAMPAIGN EFFORT PROVIDE THE BOARD AND OTHER CAMPAIGN LEADERS AN OPPORTUNITY TO SEE HOW THE CAMPAIGN PLAN IS WORKING.

Planning for the wrap-up phase of the fund-raising effort also will serve to energize volunteers and staff, and should result in additional gifts. New prospective donors may be identified, cultivated, and solicited. Prospective donors who have been solicited but who have not made a contribution may be re-solicited during this period. Occasionally, even current donors may make an additional gift or increase their contribution.

Accomplishing a successful comprehensive campaign is a gratifying experience. Trustees and other campaign leaders see their efforts result in significant changes to the institution. The institution's ability to plan and prioritize is enhanced and its ability to raise funds for future priorities is strengthened.

But the board and campaign committee still have work to do. When the campaign is completed—when all of its goals are realized—donors must be thanked, volunteers recognized, and staff congratulated. Everyone involved in the campaign—trustees, college officials, campaign committee members, professional staff, and volunteer leaders—plays an important part in thanking donors and acknowledging their gifts in ways that will make them feel appreciated. Achieving the campaign's goals will bring the board, campaign leaders, and donors closer to the institution, fund most of the priorities of the campaign, and greatly enhance the institution.

Resources

Phelan, Joseph E. and Associates. *College and University Foundations: Serving America's Public Higher Education*. Washington, D.C.: Association of Governing Boards of Universities and Colleges, 1997.

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Comprehensive Fund-Raising Campaign

Model Campaign Giving Table
Gift Levels and Number of Gifts Needed to Achieve Campaign Goals

Campaign Goal: $50 million

Needed			Received	
Gift Range	*Number of gifts*	*Total*	*Number of gifts*	*Total*
$2,000,000	5	$ 10,000,000		
$1,000,000	10	$ 10,000,000		
$ 500,000	20	$ 10,000,000		
$ 250,000	20	$ 5,000,000		
$ 100,000	50	$ 5,000,000		
$ 50,000	60	$ 3,000,000		
$ 25,000 *(and under)*	many	$ 7,000,000		
Total		**$50,000,000**		**$ 50,000,000**

Comprehensive Fund-Raising Campaign

Model Campaign Committee Description and Responsibilities

Membership

10-12 members

Staffed by

Chief Advancement Officer (or Director of Development)

Responsibilities

- Assist in developing campaign policies
  - Volunteer organization
  - Types of gifts (what is acceptable, what gets counted)
  - Gift reporting (how gifts are counted)
  - Written gift agreements
- Revise campaign goals and objectives as necessary
- Provide input and guidance to the case statement writer
- Identify donor prospects
- Help formulate strategies for successful donor cultivation and solicitation

Desirable Qualifications

- Belief in the university or college and in the purposes of the campaign
- Willingness to make a personal financial commitment
- Time to devote to the campaign effort
  - Monthly committee meeting
  - Two-to-three-hour solicitation training session
  - Approximately two hours per week for cultivation and solicitation activities
- Connections to various college constituencies
- Previous experience as a fund-raising volunteer *(or a willingness to learn)*

Frequency of Meetings

Monthly

Comprehensive Fund-Raising Campaign

Model Job Description
Campaign Committee Chair

Primary Responsibilities

- Preside at campaign steering committee meetings
- Make key solicitation calls with president, board chair, or other volunteers
- Serve as public spokesperson for the campaign
- Help identify and enlist steering committee members and subcommittee chairs
- Report campaign progress to the board

Additional Responsibilities

- Attend major campaign events
- Thank donors for special campaign gifts (with assistance from development staff)
- Attend subcommittee meetings when possible

Time Commitment

- Monthly steering committee meeting
- Cultivation information/solicitation training session
- Approximately three hours per week for cultivation and solicitation activities

This publication is part of ***Board Basics***, an AGB series devoted to strengthening the effectiveness of governing boards and trustees. Board Basics comprises several topic clusters—The Fundamentals, Effective Committees, Financial Matters, Foundation Relations, Fund-Raising, and Strategic Decisions—each of which contains several booklets. Several assumptions underlie the series:

- Academic trusteeship grows increasingly ambiguous, and trustees need concise, accessible, and focused information to help them carry out their complex fiduciary and stewardship responsibilities.
- Basic principles of trusteeship remain constant across higher education, regardless of institutional type, size, and mission. The series highlights these general principles to provide trustees with a core of knowledge they can apply to their individual institutions.
- The series addresses the distinguishing characteristics of academic trusteeship, especially as it differs in scope, substance, and focus from corporate directorships and other board service.

AGB and its authors welcome comments and suggestions to improve this publication and others in the series. Call the AGB Publications Department at 800/356-6317 or visit our Web site at www.agb.org for more information.

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